



**DECEMBER 2025 · QUALITY & HANDOVER**

# **Prepare the handover pack while the project is running**

Handover becomes difficult when documentation is treated as a final administrative exercise. An index agreed early can make it easier to collect the right records as work progresses and see what is still missing.

## **Clear information. Confident next steps.**

Eight-page reading booklet  
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**01 / UNDERSTAND**

# Start with a clear foundation

## Agree the index with the customer

Use the customer's contractual deliverable requirements as the starting point. A manufacturing data record may contain drawings, material records, inspection reports, test results, supplier documents and an approval history. The exact contents depend on the project. A standard template is a useful structure, not a substitute for the agreed scope.

## Collect records at their source

Give every expected record an owner and a due point. Record identifiers that connect reports and certificates to the relevant equipment or component. If a report is missing, retain an open item rather than creating a document that appears to prove work has been performed. Compilation records evidence; it does not create the underlying inspection or approval.



**02 / APPLY**

# Turn information into action

## Issue a navigable package

Use a clear contents list, readable filenames and bookmarks. Check that links open the intended documents and that the index matches the actual files. Make incomplete or pending items visible to the approving party before final handover. Keep the final issued pack separate from working files.

## Do not wait for the final week

A handover coordinator may discover that a test report is missing after equipment has left the workshop. Retrieving the evidence then may require locating people, instruments and records that are no longer together. An early index helps identify which documents are created only at specific stages. Assign owners and collect the record when the activity occurs. Where the contractual index changes, record the change and its effect on responsibilities. A blank template does not close the requirement for a completed and approved record.



**03 / LOOK CLOSER**

# Separate completeness from acceptance

A package can contain every expected filename and still be technically unacceptable. Check both the presence of records and the required review evidence. Verify that certificates refer to the correct items, revisions match the installed configuration and open matters are declared. Present unresolved items transparently to the approving party with the proposed action. Do not replace an absent approval with a generic signed-looking cover sheet. The final issue should preserve exactly what the customer reviewed and received.

- Which user needs this information most urgently?
- Which source is authoritative, and who can approve it?
- What would make a small pilot useful to your team?

**04 / WORKSHOP**

# Make it a team conversation

Use one small, approved example from your own organisation. Nominate a document owner and a reviewer, then apply the checklist below. Record the initial problem, the proposed improvement and the evidence needed to confirm it. Keep the exercise separate from any live equipment activity or production change until the appropriate authority approves it. Discuss what became clearer, which inputs were missing and whether the same approach can be repeated. A modest improvement that your team actually uses is a stronger starting point than an ambitious system with no agreed owner.

- Name the document owner and technical reviewer.
- Write down one unresolved source-information question.
- Agree one measurable information-finding task.
- Record what changed after the review.



**05 / WORK WITH CDX**

# A practical delivery partnership

CDX can help organise the source material, prepare a representative layout, produce the agreed CAD or documentation outputs and maintain a comment register through review. Offshore production is coordinated by Australian management under a defined scope. We do not provide engineering sign-off or create evidence of inspections that have not occurred. Bring the approved source information, your intended audience and the required deliverable list to the discussion. We will identify the preparation work, unresolved questions and review responsibilities before agreeing the production scope.

- Standard documentation · current rates online.
- CAD / drafting support · current rates online.
- Technical documentation · [cdx.net.au/pricing](https://cdx.net.au/pricing).
- 12-month work warranty; scope and conditions apply.



**06 / CHECK & ACT**

## Your next step

Review one current project today and identify its five most difficult records to obtain. Request them while the people and equipment involved are still readily available.

- Agree the handover index.
- Allocate a record owner.
- Track outstanding records as the job progresses.
- Reconcile the index and final files.
- Record approval and the final issue revision.



**07 / TAKE IT FORWARD**

# A one-page improvement brief

Use these prompts to start a focused discussion with your team. Keep confidential equipment details inside your approved project channels.

- Problem: what information is difficult to find or trust?
- Reader: who needs it and at what point in their work?
- Source: which approved files and records exist?
- Deliverable: what would make the information usable?
- Review: who will confirm the technical content?
- Success: how will you check whether it helped?

## Start a scoped conversation

[td-industrial-studio.mangleshbpatel.chatgpt.site/quote](https://td-industrial-studio.mangleshbpatel.chatgpt.site/quote)

General educational material. CDX prepares work for review and does not provide engineering sign-off. Your responsible authority approves equipment-specific instructions and technical decisions.